

## Job Description

<b>Job Title:</b>	Finance Business Partner Assistant
<b>Salary Range:</b>	£25,000 to £35,000
<b>Reports to:</b>	Senior Finance Business Partner
<b>Location:</b>	Office based or Remote Working

### Purpose

We need an experienced and dedicated Finance Business Partner Assistant to provide high quality and timely financial information and analysis to Shaw Trust's Finance Business Partner Team and key external stakeholders. You will be working as part of a wider team 12 colleagues delivering accurate, efficient and insightful financial management support services to the Charity.

We need a customer focused individual who will is able to use their commercial acumen to ensure service quality is maximised and organisational financial performance targets are achieved.

We need someone who is comfortable without daily direct supervision and comfortable developing excellent working relations with a wide range of colleagues in a large (£200m+) turnover dispersed organisation.

### Main Duties and Responsibilities

1. To be responsible for the collation and production of a range of financial returns that are required to meet externally imposed contractual reporting requirements. To provide an effective and efficient claims review and administration service, ensuring that accurate and timely claims are submitted to the Contract Manager and / or the contract commissioner in line with contractual obligations.
2. To support Finance Business Partner colleagues with the preparation of monthly management accounts and financial analysis as directed. This will include the preparation of accruals and prepayments to produce accurate and reliable financial information for specific areas to operational colleagues and external stakeholders.
3. To support Business Partner colleagues with their reporting and analysis of budget and forecast variances to actuals. Where appropriate, supporting budget holders to mitigate under performance to financial targets risks.
4. To assist in the development of appropriate systems, both computerised and manual, to ensure correct "audit trails" are maintained and records kept updated.
5. To provide admin support to the Finance Team as required, including the collation of the gift aid information, ensuring that the claim is to be submitted to HMRC in a timely and accurate manner.

6. To work with the Contract Compliance and Quality Teams to ensure the quality assurance of the Shaw Trust administrative systems and processes that relate to the claims.
7. To handle customer and staff enquiries and communications by phone and e-mail.

## Other

1. To undertake any further training as identified in the Shaw Trust review procedures.
2. Ensure that safe working practices are followed in respect of COSHH and other Risk Assessment control measures.
3. Employees must comply with the provisions of 'The Health and Safety at Work Act 1974' and must take reasonable care for the health and safety of themselves and of other persons who may be affected by their acts or omissions whilst at work. Employees are also required to co-operate with their employer to enable them to perform or comply with any statutory provisions. The Trust's efforts to promote a safe and healthy working environment can only succeed with the full co-operation of its employees.
4. To understand, comply with and promote Shaw Trust's safeguarding policy and procedures. It is the responsibility of all employees to make the working environment safe and secure for all. Everyone must adhere to the 5 Rs in relation to possible abuse: Recognition, Response, Reporting, Recording and Referral. The Trust can only ensure its dedication to the protection of vulnerable people with the full cooperation of its employees.
5. The Trust has an Equality and Diversity Policy and it is the responsibility of all staff to comply with this. The key responsibilities for staff under this Policy are set out in the Trust Code of Conduct.
6. To maintain the confidentiality about clients, staff and other Trust business. The work is of a confidential nature and information gained must not be communicated to other persons except in the recognised course of duty. The post holder must meet the requirements of the Data Protection Act at all times.
7. To maintain awareness of risk and to take personal responsibility for ensuring that the Trust is not unnecessarily exposed to risk. To report any issues or concerns relating to risk and the effectiveness of the Trust's risk management arrangements.
8. Be aware of, promote and implement Shaw Trust's Risk, Quality and Information Security Management Systems.
9. To report to line manager, or other appropriate person, in the event of awareness of bad practice.
10. Recycle and manage energy within your environment.

This job description is intended to provide a broad outline of the main duties and responsibilities only. The post holder will need to be flexible in developing the role in conjunction with the line manager. The post holder may be asked to carry out any other delegated duty or task that is in line with their post.



<p><b>Person Specification</b></p> <p><b>Job Title:</b></p> <p>(E=Essential D=Desirable)</p>
<p><b>SKILLS AND CORE COMPETENCIES</b></p>
<p><b>Technical competency (qualifications and training)</b></p> <ul style="list-style-type: none"> <li>• CCAB qualification or actively working towards one or equivalent (E)</li> <li>• Previous experience of working with Agresso Business World (D)</li> </ul>
<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>• Previous relevant experience within the Finance Department of a similar sized organisation (D)</li> <li>• Relevant experience in the production of monthly management accounts, budgets and forecasts (E)</li> <li>• High financial awareness, with the ability to communicate complex financial management information in a straightforward way (E)</li> </ul>
<p><b>Skills and Attributes</b></p> <ul style="list-style-type: none"> <li>• A good working knowledge of all Microsoft applications, with good working skills in Excel (E)</li> <li>• Good, proven, people management skills (E)</li> <li>• Ability both to identify required process improvements and to design and implement those improvements (E)</li> <li>• Ability to work with accuracy within deadlines (E)</li> <li>• Ability to work with limited supervision (E)</li> </ul>
<p><b>Personal qualities, communicating and relating to others</b></p> <ul style="list-style-type: none"> <li>• Excellent communications skills, both orally and in writing (E)</li> <li>• Commitment to customer service (E)</li> <li>• Strong persuasion and negotiation skills (E)</li> <li>• Willingness to act as an ambassador for the finance department (E)</li> <li>• Commitment to personal &amp; professional development (E)</li> <li>• A corporate team player - able to focus on the good of the broader organisation, and the clients we serve (E)</li> </ul>
<p><b>Safeguarding</b></p> <ul style="list-style-type: none"> <li>• Be able to display an awareness, understanding and commitment to the protection and safeguarding of young people and vulnerable adults. (E)</li> <li>• This post requires a disclosure and barring service check at a Basic level (E)</li> </ul>
<p><b>Other</b></p> <ul style="list-style-type: none"> <li>• Have an understanding of and be able to demonstrate a commitment to Equal Opportunities and Diversity (E)</li> <li>• A desire to work within the Charity Sector (D)</li> <li>• Willingness to travel as necessary (E)</li> </ul>